



TO: TransLink® Management Group

DATE: April 27, 2009

FR: Larry Kozimor and Jennifer Mennucci

RE: Request for Changes to the TransLink® Phase II Operating Rules

The Design Review and Implementation Committee is recommending approval of changes to sections 4.4, 4.6, 4.7.5 and 9.3.1.1 of the TransLink® Phase II Operating Rules: 4.4.4, 4.6, 4.7.5, and 9.3.1.1. The purpose of these proposed amendments is to improve the process for replacing defective TransLink® cards and to enable implementation of AC Transit's plans for distribution of TransLink® cards to youths.

Defective Card Replacement

The process for defective card replacement is unnecessarily long. Currently, when a cardholder reports a card lost, stolen or damaged, the TransLink® Service Bureau (TSB) assesses the appropriate fees, confirms the card balance (after the end of the day), and replaces the card immediately. However, when a cardholder believes his card is defective, he must complete a card replacement request form and mail it along with his non-functioning TransLink® card to the TSB post office box in Concord. TSB then tests the card to verify it is defective and then starts the process for issuing a free replacement card. If the card is damaged, the cardholder is responsible for the replacement card and balance restoration fees.

The proposed change would give cardholders an opportunity to pay card replacement and balance restoration fees up front, and then be refunded those fees if the card is found to be defective, in order to expedite the card replacement process. If a cardholder did not want to pay the fees upfront, he still would be able to mail his card to TSB prior to receiving a replacement.

The DRAIC also recommends adding language that clarifies system limitations related to remote balance restoration. Section 4.6.3 is deleted since it is redundant with Section 4.5.

Please see Attachment A for the proposed changes to the TransLink® Phase II Operating Rules.

Youth Card Distribution

Currently, a patron may request a card configured for the Youth fare category by presenting an approved form of identification (driver's license, state ID card, "Green card," Matricula Consular card, Military ID or Military Dependent card, or passport). He or she may also present a birth certificate when applying in person.

Currently, there are no requirements for photos or any other form of personalization on Youth cards. The Operating Rules further specify, “Transit operators may establish additional age verification procedures for determining eligibility for the Youth fare category, subject to the approval of the TransLink® Consortium.”

AC Transit has proposed limiting the use of its Youth discount pass on TransLink® to patrons who obtain a personalized card from AC Transit. The proposal has two implications that should be addressed in the Operating Rules.

First, the proposal calls for certain fare products (in this case, the AC Transit Youth 31-day pass) to be limited to Youth cards issued and personalized by AC Transit. If non-AC Transit-issued youth cards are found to have this pass on them, AC Transit could request that the fare product be blocked by the TransLink® Service Bureau. Distribution devices, e.g. Add Value Machines, the website and ticket office terminals, will make the AC Transit Youth fare product available whether or not AC Transit has personalized the card, so any enforcement will occur after a customer has inappropriately loaded the AC Transit youth fare product to a non-AC Transit-issued youth card.

Second, the proposal calls for AC Transit to offer to “swap” a patron’s non-personalized Youth card for a personalized one issued by AC Transit in order to be eligible to buy the Youth pass. AC Transit is asking the TransLink® Consortium to absorb the cost of the new card, so that the swap can occur at no cost to the patron.

Attachment B contains proposed changes to sections 4.4.4, 4.7.5, and 9.3.1.1 of the Operating Rules.